

City of Newton

Community Preservation Committee

Annual Report FY 2003

EXECUTIVE SUMMARY

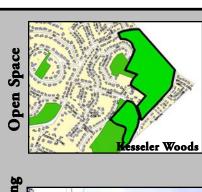
Introduction

The past eighteen months have been an intense but exhilarating experience for the Community Preservation Committee (CPC). Following passage of the Community Preservation Act (CPA), MGL c.44B, by Newton voters in November 2001, the CPC members were designated and convened the first CPC meeting in February 2002. The CPC accomplished three important objectives in its initial six months. As required by the CPA, the CPC studied the resources and needs of the community as well as the possibilities for expenditure of CPA funds. After soliciting public comment, the CPC issued the Community Preservation Plan, October 2002 (copies can be found online at www.ci.newton.ma.us/planning/CPA.) Finally, a process for application, review, and granting of funds was developed in cooperation with the Board of Aldermen, who have final responsibility for appropriation of CPA funds under the law.

FY03 Projects Funded

The first round of project applications was accepted in November 2002 and a total of 20 applications were received, 15 of which were complete. The CPC carefully reviewed each project application and held public hearings to gain input from the community. Ultimately, the CPC recommended 12 projects to the Board of Aldermen for funding and, after further scrutiny by the Board, were approved.

In addition to the initial round of applications, three more proposals were brought to the CPC as time-sensitive opportunities that would be lost if delayed until the next scheduled funding round: Kesseler Woods; the Forte Property at 76 Webster Park; and the Pelham House project. Kesseler Woods and the Forte Property were approved in fiscal year 2003 and Pelham House was not taken up by the Board of Aldermen until after the 2004 fiscal year began, and was approved in July 2003.







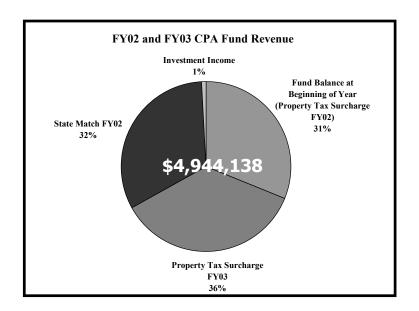


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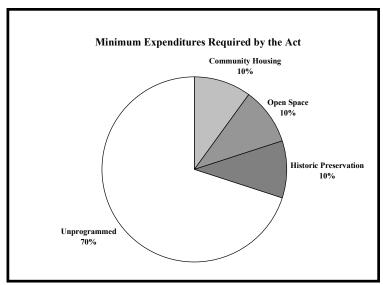
The table on the next page shows the projects recommended by the CPC and approved by the Board of Aldermen, including the amounts funded and the dates of submission and approval.

Fund Sources & Distributions

Community Preservation Act projects in Newton are funded by a one percent surcharge on real estate taxes, which began in Fiscal Year 2002 This money is augmented by a state match from the Massachusetts Community Preservation Trust Fund according to a formula outlined in the Community Preservation Act. In FY 2002, \$1.52 million was raised through the surcharge and was matched by an equal amount from the State. In FY 2003, the local fund was \$1.78 million and was again matched at 100 percent. The following chart shows the sources of CPA funds:



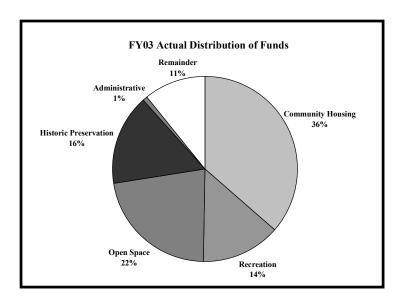
The CPA requires that at least ten percent of total funds be expended or reserved for each of three community preservation activities each year: open space, community housing, and historic preservation. Up to five percent of the total CPA funds can be spent on administrative expenses. The remainder can be allocated for the three primary activities as well as recreation in any proportion that the CPC and the Board of Aldermen determine is appropriate. The following charts show the allocations required by State law and, on the following pages, the actual expenditures in each category during the 2003 fiscal year:



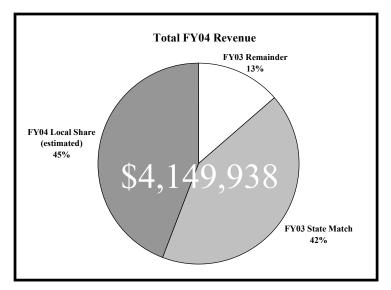
FY2003 CPA Funded Projects

					Board	
Omoin 4 coiona	omen transfer	200	CPA Amount	Date of CPC	Approval	Appropriation
Christina Street	Applicant Name	Housing	\$378 000	25-Feb-03	O Apr-03	20-Apr-03
Cambria Road	CAN-DO	Housing	\$200,000	19-Feb-03	9-Apr-03	29-Apr-03
Nonantum Village Place	CASCAP, Inc.	Housing	\$850,000	19-Feb-03	9-Apr-03	29-Apr-03
1	Historical Society and Parks &	Historic				
Burying Grounds	Recreation Department	Preservation	\$188,277	19-Feb-03	22-Apr-03	12-May-03
,	Force and Public Buildings	Historic				
City Hall Windows	Department	Preservation	\$119,400	19-Feb-03	19-May-03	8-Jun-03
	Public Buildings Preservation Task					
City Hall Lighting	Force and Public Buildings Department	Historic Preservation	\$96,200	19-Mar-03	19-Mav-03	8lun-03
	Public Buildings Preservation Task Force and Public Buildings					
City Hall Balustrade	Department	_	\$176,660	19-Mar-03	19-May-03	8-Jun-03
	Newton Free Library and Public	Historic				
Newton Corner Library	Buildings Department	Preservation	\$195,129	19-Feb-03	14-Jul-03	3-Aug-03
Elgin Street	Newton Conservators and Conservation Commission	Open Space	\$245,000	19-Feb-03	7-Apr-03	27-Apr-03
Flowed Meadow	Conservation Commission	Open Space	\$74,250	19-Feb-03	7-Apr-03	27-Apr-03
Kesseler Woods	Executive Office and Planning & Development Department	Open Space	\$5,000,000	14-May-03	2-Jun-03	22-Jun-03
Forte Droposty/(Maheter Dark	Newton Conservators, Newton Housing Authority, and Conservation Commission	Open Space	77	7 11 10 10 10 10 10 10 10 10 10 10 10 10	7	6.00 6.00 6.00 6.00 6.00 6.00 6.00 6.00
- Old - Obelly Websiel - aln			9000	00150	5	SO-BRV-S
Bowen Ballfield Irrigation	Newton East Little League and Newton Youth Soccer	Recreation	\$56,805	19-Feb-03	5-May-03	25-May-03
Forte Park	Parks & Recreation Department	Recreation	\$500,000	9-Dec-02	16-Dec-02	5-Jan-03
Kayla's Garden	Memorial Spaulding Elementary School and PTO	Recreation	\$23,718	19-Feb-03	16-Jun-03	6-Jul-03
Albemarle Comm. Clsm.	The Playground Project at Albemarle, Inc	Recreation	\$99,931	5-Jun-03	14-Jul-03	3-Aug-03
Total Amount Funded			\$4,313,370			
(The total does not include Kesseler	seler Woods because it will be bonded over 10 years and payments will begin in FY04)	ed over 10 years	s and payments will	begin in FY04)		

General Footnote: While some projects have mutiple categories, only the specific category(ies) that the CPA funded are listed in this Table (For example, the Forte Property Project also included an historic preservation component, but CPA funds are not being used to subsidize this portion of the project, therefore only housing and open space are listed in the Table).



In looking ahead to FY 2004, the CPC is updating its plan and process. A new funding round will commence in November. The CPC anticipates \$1.83 million of local-share funds (based on estimated FY2004 revenue) plus a \$1.76 million state match for the FY2003 revenue, totaling \$3.63 million in new funds. \$559,938 remained unappropriated from FY 2003. After subtracting \$211,936 for the Pelham House project and \$680,000 for the first bond payment on Kesseler Woods, a total of approximately \$3.3 million remains for possible expenditure in the FY2004 funding round. The following chart illustrates the sources of FY2004 funding for CPA activities.



Lessons Learned

In developing the initial Community Preservation Plan and reviewing proposals in its first full year, the Community Preservation Committee identified a number of procedural and substantive issues that will be addressed in the FY2004 Community Preservation Plan for the City. The CPC has termed these "lessons learned", reflecting the evolution of the CPC's processes during the past year. A detailed description of lessons learned are included in the projects descriptions that follow. Here we summarize some of the general lessons learned:

- (1) An independent appraisal should be commissioned for projects involving real estate acquisitions;
- (2) Proposals need to include enough details regarding plans, scope of work, and budget for the CPC to make an informed decision;

- (3) In some cases, projects may be funded prior to filing for zoning relief;
- (4) CPC needs to ensure that the proposed sales price for community housing is a price that is actually affordable to the target income;
 - (5) The CPC is not set up to act as a project developer/proponent, but rather to act as a funding source;
- (6) Maintenence plans and dedicated funding must be in place to ensure future upkeep of CPA investments, especially since CPA funds cannot be used for maintenance; and
- (7) City priorities and community interests must be better coordinated, particularly where community groups propose projects on city-owned land.

Project Audit

The CPC will monitor each CPA project on a regular basis until the project is complete. Each grantee will be required to submit an initial detailed timeline of project implementation that indicates the timing and sequence of key project milestones and a quarterly status report that describes the work already completed, work remaining to be done, and the projected project completion date.

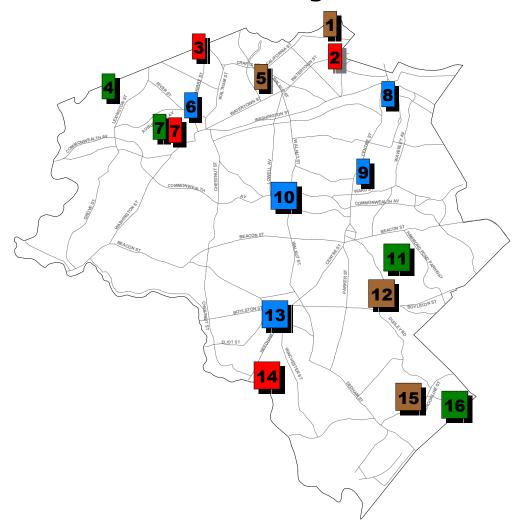
Public Outreach

The CPC is committed to public outreach throughout all aspects of the process including solicitation of proposals, review of applications, and final decision making. The CPC uses a number of outreach mechanisms to maintain a transparent process including placing ads in the Newton Tab rather than just a legal notice, maintaining open communication with reporters from the Newton Tab and the Boston Globe to encourage coverage of CPC activities, maintaining an up-to-date website at www.ci.newton.ma.us/planning/CPA, and holding well-publicized public hearings when considering funding requests. The CPC has appointed a Communications Subcommittee to oversee these efforts and to ensure effective public outreach.

Acknowledgments

The Community Preservation Committee would like to express its appreciation to a variety of groups and individuals who helped to make this a successful first year. The Board of Aldermen has been very supportive in its deliberative review and approval of our recommendations and in its suggestions for process improvements. In particular, we thank President Brooke Lipsitt, Chair Amy Mah Sangiolo, and Vice Chair Stephen Linsky of the Ad Hoc Committee on Community Preservation, Finance Chair Paul Colletti and Vice Chair Rick Lipof, and members of both committees for their time, flexible schedules, and thoughtful input. Mayor David Cohen, Planning Director Michael Kruse, members of the Planning and Development Department, and Policy and Communications Director Karen Griffey were highly supportive from the start, advancing resources and providing assistance and encouragement at every turn. Our extremely capable staff, Jennifer Goldson, joined us in January 2003 just in time to guide us through the project review process. We are deeply indebted to her for her insight, hard work, and conscientious service. Many community organizations and individuals have been indispensable to our effort, faithfully attending meetings, offering information, suggestions, and positions. Among them are the Community Preservation Coalition, the League of Women Voters, the Newton Conservators, CAN-DO, the Newton Historical Society, Newton Youth Soccer and Newton Girls Soccer, and the Newton Comprehensive Planning Advisory Committee. The five boards from which CPC draws part of its membership have also been active, including the Conservation Commission, the Historical Commission, the Housing Authority, the Parks and Recreation Commission, and the Planning and Development Board.

City of Newton Community Preservation Fund FY03 Projects



PROJECT NAME

- 1 Forte Park, Phase II
- 2 Nonantum Village Place
- 3 Cambria Road
- 4 Flowed Meadow
- Newton Weadow
 West Parish Burying Ground
 Forte Property Webster Park
 Newton Corner Library

- 9 East Parish Burying Ground
- 10 City Hall Restoration 11 Elgin Street Vacant Lot
- 12 Thompsonville Playground
- (Bowen Elementary)
 13 South (Evergreen) Burying Ground
 14 Christina Street (MEHP)
- 15 Kayla's Garden
- (Memorial-Spaulding Elementary)
- 16 Kesseler Woods

COLOR KEY

Community Housing Open Space Historic Preservation Recreation

The information on this map is from a digital data base The information on this map is from a digital data base accessed using the Newton Geographic Information System (GIS). Newton cannot guarantee the accuracy of the information contained on this map. Each user of this map is responsible for determining its suitability for his or her intended use or purpose. City departments will not necessarily approve applications based solely on GIS data. Applicants for city permits and licenses must inquire of the relevant city department for applicable requirements. City staff correct errors in these data as they are identified. Newton's GIS Administrator maintains records regarding the source materials and methods used to create the digital data and will disclose this information upon request.







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OPEN SPACE

GOALS

- 1. Provide protection for land listed in the Recreation & Open Space Plan.
- 2. Expand existing open space.
- 3. Enhance biodiversity or wildlife habitat and reclaim natural resources.
- 4. Protect wetlands, mitigate flooding and improve groundwater recharge.
- 5. Create small pocket parks.
- 6. Enable the development of passive recreation opportunities.
- 7. Serve as suitable sites for nature-related education, scientific study, or observation and enjoyment of nature.
- 8. Protect a natural feature of special interest.
- 9. Enhance public access (where access does not seriously threaten habitat).
- 10. Provide linkages and wildlife corridors between open spaces.

Four open space projects were recommended and approved for CPA funding in FY 2003. Three of these four projects added acreage to existing conservation areas: Elgin Street, Forte Property; and Kesseler Woods. In the case of Kesseler Woods, this major addition of open space not only extends existing conservation land, but also interconnects three existing open space parcels, protecting wetland resources and adding significantly to their value as wildlife habitat while providing important passive recreation opportunities. In addition to open space acquisition, the committee funded the improvement of the Flowed Meadow Conservation Area, adding amenities that protect its resources while making it available for passive recreation uses.

The four projects approved in FY 2003 together address all of the goals set out by the CPC except that of creating small pocket parks. This remains an important goal and we look forward to proposals in coming years that would begin to address this need. In addition, while we had the good fortune to acquire three properties that ranked high on the city's Recreation and Open Space Plan list of priorities, several important opportunities remain and we encourage proposals as these properties become available.

FY03 PROJECTS

Elgin Street Vacant Lot

Location: Elgin Street; Assessor's parcel id #650040042

Applicant: Newton Conservators and Newton Conservation Commission

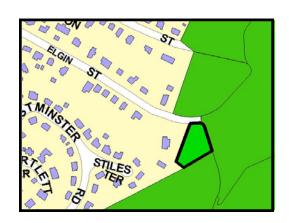
Requested Funding: \$245,000 (\$235,000 for acquisition +

\$10,000 for for appraisal and related expenses)

Approved Funding: \$245,000

Project Description

This proposal was to acquire a 30,514 sq. ft parcel (0.7 acres) as open space adjacent to the existing Cohen and Webster Conservation Areas between Elgin Street and Hammond Pond



Parkway and to provide additional protection for the parcel through a Conservation Restriction (CR) to be held by the Newton Conservators. This vacant parcel is large enough to be subdivided into two buildable lots. In 2001, the owner of the property (Alex Wilmerding), who also owns the adjacent lot as his principal residence, donated a conservation restriction for a portion of the vacant parcel. Subsequently, through this proposal to the Community Preservation Committee, he offered an option to the City to purchase the entire vacant parcel.

Project Analysis

The CPC determined that the proposal met the criteria established under the CPA as well as overarching community goals and specific open space goals under the Community Preservation Plan. The CPC strongly supported the project.

Since MGL c.40, Section 14 prohibited the City from purchasing property for over 125% of its assessed valuation, the proposal was modified to extend the existing conservation restriction with a subsequent option to purchase it for \$1. (The law has been subsequently amended to remove this prohibition and other acquisition impediments.) The funding request remained the same.

The CPC and the Aldermen grappled with the question: What is the property really worth? To answer this question, the CPC commissioned an independent appraisal of the property. The appraisal estimated market value at \$700,000, which represented quite an increase over the owner's original appraisal of \$415,000. The CPC recommended approval of the requested funding to the Board of Aldermen, which subsequently approved the request.

Lessons Learned

Require an independent appraisal for all real estate acquisitions, commissioned by the CPC and funded by the applicant. The appraiser estimated market value of the subject lot as a stand alone parcel and the value of the owner's remaining property. The values he determined indicated that the purchase price was not only fair, but below market.

Flowed Meadow Improvement Project

Location: West Newton, adjacent to Purgatory Cove;

Assessor's parcel id #4100310051 and 43

Applicant: Newton Conservation Commission and

Parks & Recreation Department **Requested Funding:** \$74,250 **Approved Funding:** \$74,250

Project Description

A chief goal of the project was to preserve and protect a sensitive land resource. In order to enhance passive enjoyment of the open space, and to preserve and protect wetland resource areas and wildlife habitat by limiting access in sensitive areas, the project proposed to create new and improved access to the unimproved portion of Auburndale Park and the new Flowed Meadow Conservation Area (formerly part of the Rumford Avenue Landfill).

Site control was assured since Flowed Meadow was recently put under the control of the Conservation Commission and the adjacent Auburndale Park is under control of Parks and Recreation Department. CPA funds were requested for labor and materials for pathways, signage, and benches as outlined in *Recommendations of the Flowed Meadow Planning Group* (August 2000). The Flowed Meadow Planning Group was established by the Mayor and met between July 1999 and March 2000.

Funding was not available out of existing department budgets, which already have their funds committed to maintenance of existing facilities and emergency work. Funding this work from the Capital Improvement Program had been denied for several years.

Project Analysis

The CPC determined that the proposal met the criteria established under the CPA as well most of the overarching goals and a majority of the specific open space goals under the Newton Community Preservation Plan. It also met several recreation goals, since the project provides for passive recreation. A maintenance plan will be part of the Conservation Commission's annual maintenance contract with a private contractor. The Parks & Recreation Department will provide supplemental maintenance assistance. The CPC strongly supported the project.

In considering this proposal, the CPC wrestled with several issues that have ongoing policy implications:

- (1) Since the CPA expressly allows for rehabilitation of recreation land that was aquired with CPA funds, does the CPA allow funding of projects that rehabilitate *existing* recreational land? The CPA defines rehabilitation as ". . . the remodeling, reconstruction and making of extraordinary repairs. . ." and preservation as "protection of personal or real property from injury, harm or destruction, but not including maintenance." After considerable discussion and close reading of the language of the CPA, the CPC determined that the closing of existing path and replanting it with appropriate species, as well as creating the new path, were essentially acts of preservation of a sensitive open space area rather than rehabilitation of existing recreation areas. The CPA does allow preservation of sensitive open space areas.
- (2)Accuracy of the Budget: Although the departments in charge of preparing work specifications and the scope of work for bidding are experienced, the CPC was concerned about lack of specificity of items that must be bid, the basis for their cost, and the necessity for adequate contingency estimate. Although there was a map of the area and a project description, there was no map of the location of work to be done or new items such as signs and benches, and no detailed specs on benches and signs. The CPC requested these items prior to voting on the project.

Lessons Learned

- 1. Future proposals should include enough detail regarding plans and scope of work for the CPC to make an informed decision.
- 2. The CPC identified the need for detailed estimations and greater transparency from applicants who prepare budgets pertaining to capital improvements or other construction projects. In particular, it wants to develop: (1) the required inclusion of a contingency budget in any funding request which requires materials and labor; and (2) a mechanism to examine more closely the estimated budget for all construction projects.
- 3. Differentiation of the terms "preservation" and "rehabilitation" can be very difficult to rationalize, especially since in some contexts the meanings overlap, while in others they are quite distinct.

FORTE PROPERTY - WEBSTER PARK

Location: 76 Webster Park; Assessor's parcel # 330220036

Applicant: Newton Conservators, Inc., Newton Housing Authority, and Newton Conservation Commission

Requested Funding: \$1,110,000 Approved Funding: \$1,110,000

Project Description

This proposal was to acquire a 49,974 sq. ft. (1.15 acre) parcel adjacent to the Dolan Pond Conservation Area and within the Webster Park National Register District to permanently preserve a large portion of the site as open space and to create three units of community housing. The project, which includes an extensive amount of forested uplands, expands animal habitat and contains scenic views of Dolan Conservation Area, adding to its open space value. The land will be purchased by the Newton Conservators, who will place a permanent deed restriction on approximately 35,0000 sq. ft (70%) and deed the land to the City.

To create three units of community housing, Habitat for Humanity will acquire the remainder of the land from the Conservators. Two of units will be homeownership units that will be constructed to the rear of the existing house by Habitat for Humanity. The third unit, which will be created through the renovation of the existing Craftsman/Colonial Revival Style house, will be undertaken by the Newton Housing Authority and will be a rental unit. The renovation will be historically appropriate and will be reviewed by the Newton Historical Commission. All three units will be restricted to households with incomes at 80% or less of the area median and will be bound by a permanent deed restriction.

Project Analysis

Overall, the CPC was very pleased to recommend approval of this worthy project. It was the first project to meet the goals of open space, community housing, and historic preservation in one project. Although the CPA only funded the housing and open space components of the project, the project has the collateral benefit of preservation of the existing house on the property, which was constructed in 1925.

This project is consistent with the CPA, the Community Preservation Plan's overarching goals as well as the majority of its open space and community housing goals. As strengths of the project, the CPC noted that The *Recreation & Open Space Plan* identifies 76 Webster Park as a priority parcel for purchase of a Conservation Restriction on the top of the hill overlooking the Dolan Pond Conservation Area. This project would both expand the existing Dolan Pond Conservation Area and preserve the open space linkage between Dolan Pond and Webster Park, the small urban park in the center of this neighborhood.

The CPC also noted, as a strength with respect to *community housing goals*, that the project is leveraging \$500,000 of the Inclusionary Zoning Ordinance funds from the Newton Housing Authority for rehabilitation of the existing house and creation of up to two additional new units. This project would create new housing clustered adjacent to the existing single-family house. The remainder of the site would be permanently protected open space.

One policy issue the CPC discussed was how to interpret the value as estimated by the independent appraisal (only \$900,000) against the seller's asking price of \$1.1M. Ultimately, the CPC determined that the appraisal made conservative assumptions and that the unique value to the City of open space controlled by the City warrants paying a reasonable premium (that would be amortized over many generations of Newton residents benefitting from the current acquisition) to ensure that the resource is not lost. Subsequent to the CPC's decision, but prior to the Board decision, the applicant commissioned a second independent appraisal which estimated land value at over \$1.1 million, thus providing further justification for support of the expenditure.

Although the CPA application states that the applicant needs to provide evidence that the project complies with the zoning ordinance, this project clearly required zoning relief to build the third unit of housing in this multi-residence district (MR-1). The CPC supported this project and recognized that the opportunity would have most likely been lost had the CPA funding not been available in the early stage of the project.

There has been some neighborhood opposition to the community housing aspect of the project. In particular, the neighbors raised the following objections: (a) targeted incomes of less than 80% area median, preferring moderate incomes of up to 100%; (b) development of rental housing, preferring owner-occupied housing; and (c) the number of units, preferring one unit in the existing house and one additional unit rather than two additional units. The CPC responded to these concerns by incorporating conditions into its vote that required the applicant to seek neighborhood consensus on the main issues raised.

As a result of a recommendation by the Ad Hoc Committee to ensure preservation of the historic character of the existing house, the CPC incorporated a condition requiring design review of the rehabilitation plans by the Newton Historical Commission.

Lessons Learned

- 1. The CPC has determined that it needs to develop a policy and guidelines on appraisal requirements and interpretation.
- 2. The CPC grappled with the status of zoning approvals and permits prior to approval by the CPC. The CPC application should be clear regarding the status of the project under the zoning ordinance. The application should clearly state that funding requests must include either evidence of compliance with zoning or a description of what zoning relief may be needed and when the zoning application will be brought before the appropriate City Board.
- 3. What standards should the CPC use in evaluating neighborhood opposition to a project that otherwise meets CPA criteria? Community housing projects usually generate some level of neighborhood opposition. The CPC recognizes that community support and community opposition must be evaluated in the review of each project.

Kesseler Woods

Location: LaGrange, Vine, and Brookline streets; Assessor's

parcel id #820410022 and #820370003 **Applicant:** Executive Department and Planning & Development Department **Requested Funding:** \$5,000,000 **Approved Funding:** \$5,000,000



Project Description

The proposal requested CPA funding of up to \$5,000,000 to preserve up to 28 acres of Kesseler Woods, a tract of more than 42 acres of unprotected open space in Newton. The land is owned by the Boston Edison Company (NSTAR) and includes two (2) parcels of land at LaGrange and Vine Streets, in the southeast corner of the City. The north parcel contains more than 33 acres and the south parcel contains nearly 9 acres. The land is currently zoned single-family residential.

Boston Edison offered this land to the highest bidder in a sealed bid auction on June 20, 2003. The results of the initial bid were inconclusive. Subsequently, Boston Edison called for a second round of bidding on August 8, 2003 and asked the City to submit its final and best bid.

In order to assemble a competitive bid, the City co-bid with a development firm, Cornerstone Corporation of Norwood, MA. The City selected Cornerstone through a highly competitive process that began with the City's Request for Interest (RFI), released on March 28, 2003. The RFI led to expressions of interest from 10 development firms. The Mayor presented the 10 development schemes at a community meeting in May where citizens voiced support for using CPA funds to maximize open space preservation and create affordable housing at appropriate densities on the site. Through intense negotiations with City officials, Cornerstone produced a reasonable plan of development that created market rate and affordable housing on less than half of the land, leaving the remainder of the site open.

The Mayor presented a request for \$5,000,000 of CPA funds, that would be bonded over 10 years, to the CPC and the Board of Aldermen prior to submitting the first bid to Boston Edison on June 20. The CPC and Board approval of the request enabled the City to submit a cobid for a total of \$11,300,000 of which Cornerstone was contributing \$6,300,000. Boston Edison rejected all bids in the first round and invited some bidders, including the City and Cornerstone, to submit a new bid. During the second round of bidding, Cornerstone increased its share of the bid to \$10,100,000 to bring the total bid to \$15,100,000. Shortly after submitting the second bid on August 8, the City learned that its bid was the winner. The Mayor requested an additional \$1,018,500 of CPA funds as required by the City's agreement with Cornerstone. The Closing is scheduled for January 2004.

Project Analysis

This project was a truly rare, once-in-a-generation opportunity that enabled the City to acquire one of the largest private open space areas in the City and to meet a combination of CPA goals: open space protection, creation of a new passive recreation trails, and creation of community housing. This unique project uses CPA money in conjunction with money from a private developer to compete with other private developers for the acquisition of this desirable property. The CPC was supportive of the project concept, but did have initial concerns regarding the significant amount of CPA funding requested (\$5M, initially). Through analysis of various bonding scenarios, the CPC recommended that the funding be approved and bonded for a term of 10 years, which would obligate approximately 40% of the local share of the fund each year (not including potential revenue from the state matches). Although this is a large portion of the total CPA funding, the CPC did not want to lose the opportunity to preserve this significant open space, create public recreation trails, and to create community housing.

Lessons Learned

- 1. Community input is critically important for all CPA funding requests, and is particularly important for requests of this magnitude. This project was unusually challenging in this regard due to the confidential nature of the City's bid to Boston Edison for the land, however the CPC made a concerted effort to seek community input at each step throughout the process.
- 2. The CPC can be a catylist for coordinating and funding the planning activities necessary for significant open space acquisition and community housing creation.

COMMUNITY HOUSING

GOALS

- Create community housing that is well designed, is of high quality, and is based on sound planning principles.
- 2. Address one or more of the City's priority housing needs, such as those articulated in the City's Consolidated Housing Strategy Plan 2001-2005 and A Framework for Newton's Planning.
- 3. Help Newton reach the state mandate of having 10% of its housing stock as affordable to those at or below 80% of median income under MGL c.40B.
- 4. Create new moderate housing units (80% to 100% of median income) that promote housing for City employees, such as teachers, firefighters, and police officers.
- 5. Keep new units affordable for the long term, and in perpetuity where possible.
- 6. Use deed restrictions to acquire, update, and resell existing market rate housing as affordable units, following the small house program model.
- 7. Show that the proposal leverages or is not otherwise eligible for other public funds and could not otherwise be economically feasible without CPA funds, such as proposals for community housing targeted at households earning between 80% and 100% of area median income.
- 8. Demonstrate that the proposal works in conjunction with other funding mechanisms already available in Newton such as the First Time Homebuyer Program, which currently cannot adequately assist families in purchasing homes in Newton.
- 9. Provide community housing opportunities for individuals whose residency in Newton would promote community services, such as Newton teachers and public safety workers and other city employees.
- 10. Create affordable and moderate homeownership opportunities for families who currently rent or work in Newton.
- 11. Help disperse community housing throughout the City by siting housing in neighborhoods that currently lack affordable housing.
- 12. Reuse previously developed sites (including, potentially, remediated brownfield sites) for community housing with minimal effect on existing housing resources.
- 13. Avoid displacement of current residents.

During FY 2003, the Community Preservation Committee evaluated and recommended funding for five community housing projects with the potential to add 54 units to the City's stock of affordable housing. The Nonantum Village Place project will create 35 rental units of elderly housing for a highly leveraged \$24,000/unit of CPA money; Cambria Road will provide two rental units to Section 8 households; and Forte Property/Webster Park, which will also produce substantial open space and historic preservation benefits, will provide two homeownership units and one rental unit to families with incomes at or below 80% of the area median income. Unfortunately, market conditions defeated the viability of one project, Christina Street, which would have created three affordable home-ownership units for municipal employees. The fifth project, Pelham House, is considered an FY04 project because the Board of Aldermen approved the project during FY04, therefore this project will be included in next year's annual report.

The CPC evaluates projects with the objective of meeting as many of the community housing goals (listed above) as possible. Taken together, the projects considered during FY 2003 attempted to address all of these goals. The CPC will continue to support the creation of housing that is affordable for community service providers and households with income ranges at or below 100% of the area median income, that is dispersed throughout the community, and that is affordable for the long term.

FY03 PROJECTS

Cambria Road Rental Project

Location: 18-20 Cambria Road, Assessor's parcel id#

340450014

Applicant: Citizen's for Affordable Housing in Newton

Development Organization, Inc. (CAN-DO)

Requested Funding: \$200,000 Approved Funding: \$200,000



Project Description

The goal of the Cambria Road project was straightforward: to purchase a two family home at market price, renovate it, then subsidize the units for use by families with Section 8 certificates. The proposal contained a Purchase and Sale Agreement between the applicant, CAN-DO, and the owners of 18-20 Cambria Road in West Newton. The proposal also indicated financial support from the City of Newton Community Development Block Grant (CDBG), Newton Housing Rehab Fund Loan (NHRF) Lead Paint Grant, NHRF Asbestos Removal Grant, and a conventional mortgage loan from Auburndale Cooperative Bank.

The applicants requested \$200,000 to reduce the amount of the loan from Auburndale Cooperative Bank, resulting in a long term \$175,000 mortgage loan which would be paid out of rental income. The applicant presented the proposal at the public hearing on December 11, 2002, and at subsequent public meetings of the CPC. Funds were approved unanimously by CPC members and the proposal was forwarded to the full Board of Aldermen.

Project Analysis

This proposal had one very attractive feature: it was simple, and if successful, it could be replicated in other venues throughout the city. Since the building is an existing two-family, as opposed to new construction, and since it was in need of repair, the project was a clear improvement for the neighborhood. The proposal also had strong community support.

Lessons Learned

- 1. The simplicity of this project made the CPC's decision-process less challenging than the process for some of the other funding requests that were more complicated. One reason for this simplicity was that the units would be for households with Section 8 certificates, so the target population and how housing cost would be determined were very clear since Section 8 is an established program with specific criteria.
- 2. The CPC, in conjunction with the Planning Department, should create a set of review criteria to assess the costs and scope of rehabilitation work undertaken in a project such as this.

Christina Street

Applicant: Citizen's for Affordable Housing in Newton Development Organization, Inc. (CAN-DO)

Requested Funding: \$375,000

Approved Funding: \$378,000 (\$3,000 added to request for an appraisal)

Project Description

This project was also submitted by CAN-D0, and also had a very simple goal: to provide three affordable homeownership units to municipal employees. Although the project had a worthy goal and wide support, implementation proved to be problematic. CAN-DO was in the process of constructing two duplexes on Christina St. in Newton Highlands, creating four condominiums. As planned, the project was designed to sell three units at market price and one affordable unit to a first-time homebuyer.

The original request to the CPC was for \$300,000 to subsidize the purchase price of the three market rate units from \$425,000 to \$325,000, thereby creating an opportunity for homeownership for City employees. The request was subsequently increased to \$375,000 to address the CPC's concerns regarding affordability, discussed below.

Project Analysis

Through the CPC's and the City's Housing Office analysis of the original proposal, a number of issues were identified. According to Housing Office calculations and the advice of the City's consultant, the proposed affordable sales price of \$325,000 was not affordable to purchases at the target income levels. After much discussion and negotiation, the price of \$300,000 was agreed upon as affordable to the target income, so the request was increased to \$375,000, which would provide up to a \$125,000 subsidy for each unit. The CPC questioned the broker's estimate of market value of \$425,000. This estimation is important since the subsidy would write-down the purchase price from the market value to the affordable sales price. Therefore, as with the Elgin Street project and the Forte Property/Webster Park project, the CPC commissioned an independent appraisal of the property. However, this project is distinct from the Elgin Street and Forte Property projects in that the appraisal was commissioned after project approval, rather than used as a basis for project approval. Interestingly, the CPC's appraisal estimated market value at \$430,000, which is actually \$5,000 higher than the broker's original estimate. Therefore, had the program been successful, the \$125,000 per unit would have been used to write-down the units from \$430,000 to \$305,000.

The CPC questioned the structure and mechanics of the program and the community housing deed restriction. To address these questions, the applicant worked with the Housing Office to determine the key components of the program and deed restriction. Through this effort, the Housing Office developed fairly detailed guidelines for what became the pilot project for the "Municipal Employee Homebuyer Assistance Program." In addition to the concerns raised by the CPC, as described above, the Aldermen also had some concerns. The primary concern that affected the outcome of this project, and translated to affect the other community housing projects as well, was the proposed term of affordability. The original application proposed a 99-year affordability term, however the Aldermen insisted strongly that the term be extended to be permanent. Although the CPC strongly supported the goal of providing community housing to municipal employees and commends CAN-DO for making this proposal, the pilot program did not come to fruition, primarily due to the high cost of these housing units (i.e., qualified applicants did not come forward primarily because of the high monthly carrying costs on the \$305,000 purchase price). CAN-DO now plans to sell these three units at market-rate.

Lessons Learned

- 1. If a project is proposing a new program, the housing price (whether it is rental or for sale) must be affordable to the program's targeted population. In addition, the mechanics of any new program will need to be described in detail for the CPC to adequately evaluate the likely effectiveness of the program.
- 2. As the CPC learned in other projects (such as Forte Property-76 Webster Park), an independent appraisal is critical to determine fair market value when CPA funding is being requested for real estate acquisition.

3. This project originally only proposed a 99-year affordability term for the units. However, the CPC and Board of Aldermen required that the affordability term be increased to perpetuity.

Nonantum Village Place

Location: 241 Watertown Street, Assessor's

parcel id# 110120020 **Applicant:** CASCAP, Inc. **Requested Funding:** \$850,000 **Approved Funding:** \$850,000



Project Description

This 35-unit affordable elder housing proposal, the largest housing project approved to date by CPC, was well along when the Community Preservation Act was passed in Newton. It was proposed by CASCAP, Inc. for a lot to the rear of market-rate condos constructed at the former site of St. Jean's parish. This project had funding commitments from the Department of Housing and Urban Development (HUD), the Massachusetts Housing Partnership, the Newton Housing Authority, the CDBG program, the Roman Catholic Archdiocese of Boston, the Housing Innovation Fund, and the Commonwealth's Affordable Housing Trust Fund. CPC was asked to fill an \$850,000 gap out of a total project cost of \$6.2 million. Plugging this gap meant that, for about \$24,000 per unit in CPA funds, the City could realize the addition of 35 new units of badly needed affordable senior housing. Time was of the essence and without CPA assistance, the project would likely not be built. This project is scheduled to break ground in the Spring 2004, with occupancy sometime in 2005.

Project Analysis

This project demonstrated one of the key tenets of the CPC's approach to allocating CPA dollars—leveraging these funds whenever possible to maximize their value. The CPA contribution was the last into the mix, after all other options for filling the funding gap had been explored and exhausted. The maintenance of affordability of housing units in perpetuity was also accomplished. The other funding agencies had accepted an 80-year commitment to affordability, but the non-profit developer was willing to extend this to a permanent commitment as a result of the CPA process. This means that every one of these units will remain permanently affordable.

Lessons Learned

- 1. Since the CPA funding was only one of many funding sources for this project, the benefit far outweighs the CPA funding for this project. Particularly in a project this large, the CPC should encourage multiple funding sources for projects so that the CPA funding is used to leverage other funds.
- 2. As in the Christina Street project, the CPC learned of the importance of requiring a permanent affordable housing restriction. This project was originally proposing an 80-year term.

Forte Property – Webster Park

This project combined Community Housing and Open Space, but, for the sake of simplicity, the CPC has included its description in the Open Space Section of this report only, since the majority of the funds were used for Open Space purposes.

HISTORIC PRESERVATION

GOALS

- 1. Support the preservation and restoration of privately-owned properties that are on the National or State Historic Registers, or that have been landmarked or found to be "preferably preserved" by the Newton Historical Commission.
- 2. Support the preservation and/or restoration of municipally-owned resources that are on the National or State Historic Registers, or that have been landmarked or found to be "preferably preserved" by the Newton Historical Commission.
- 3. Encourage protection of resources that retain their historic integrity, in terms of location, context, design, style, workmanship, and materials.
- 4. Enable access to the resource by the public.
- 5. Support the objectives and priorities of local historic preservation organizations, such as the Newton Historical Society, the Jackson Homestead, local historic districts, and other such organizations within the City of Newton.

Eight complete applications for Historic Preservation funds were received by the CPC in FY 2003. Five were funded at a total cost of \$586,389 and three were not funded for the reasons listed below. All of the five recommended projects were for preservation of municipally-owned resources, encouraged protection of historic resources, and enabled full public access. The three City Hall projects will enhance the beauty of City Hall for many years to come. The restoration of the Newton Corner Library is long overdue and will preserve a valuable City resource. The project to restore the three historic burying grounds also fulfills the goal to support the goals of the Jackson Homestead and the Newton Historical Society.

We were not as successful in meeting the goal to preserve privately owned historic resources. Two proposals were received, for the Pillar House and for the Woodward House (on Fairlee Road), but neither proposal was developed sufficiently to warrant funding.

FY03 PROJECTS

Historic Burying Grounds

Location:

East Parish Burying Ground: Center Street, Assessor's parcel id#730010018

West Parish Burying Ground: River Street, Assessor's parcel id#330340009

South Burying Ground: Winchester Street, Assessor's parcel id#510280029

Applicant: The Jackson Homestead Museum and Newton Historical Society

Requested Funding: \$188,277 Approved Funding: \$188,277

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Project Description

In the early 1990's an extensive report on the condition of the three historic burying grounds was prepared by an ad hoc committee, chaired by the Newton Historical Society and the Jackson Homestead. The conditions

cited were deplorable. Yet for the past decade, no funds have been available for any of the work, including protection and restoration of the headstones, extensive landscaping, and rebuilding of the stone and other fencing. At the CPC public hearings in the summer and fall of 2002, a host of interested citizens supported this work as priority for CPC funds.

The Newton Historical Society and the Jackson Homestead (now known as the Newton Historical Museum) presented a complete proposal to the CPC on November 1, 2002, designed as a three-year project. The first year's work addresses major landscaping needs, and subsequent years will cover restoration of headstones, rebuilding of fences, and related improvements.

Project Analysis

This proposal, for \$188,277 was recommended unanimously by the CPC. Although the CPC has not yet been asked to fund work for Years 2 and 3, there is a strong disposition that the CPC will look favorably on those proposals. The concern about costs for on-going maintenance after the end of the project was raised by several members of the CPC at public meetings. The Community Preservation Act defines "preservation" as "protection of personal or real property from injury, harm, or destruction, but not including maintenance."

Since this project will be carried out under the purview of the Parks and Recreation Department, the CPC indicated that we will require that a commitment for ongoing annual maintenance and upkeep of the Historic Burial Grounds be included in any CPA funding requests for future phases of work on this project.

Lessons Learned

- 1. One lesson that emerges from this project is very simple: the CPC should fund projects that have strong community support, that serve a broad public need, and that have grown out of work from past planning committees.
- 2. The CPC also recognizes the importance of funds for projects which may take several years, and several funding cycles to complete. If the initial phase of this project is successful, the CPC should consider funding subsequent phases.

City Hall Restoration

Location: 1000 Commonwealth Avenue, Assessor's parcel id#640010001 **Applicant:** Public Buildings Preservation Task Force & Public Buildings Dept.

The Public Buildings Preservation Task Force was formed by the Mayor just before the passage of the Community Preservation Act. The timing could not have been better. The Task Force was charged with conducting an inventory and prioritizing the physical needs of City-owned buildings. Through that work, the Task Force identified three priority projects to restore Newton City Hall and submitted three proposals to the CPA in November 2002. The three projects (restoration of windows, historic light fixtures, and exterior balustrade) are described below.

City Hall Restoration- Windows

Requested Funding: \$119,400 Approved Funding: \$119,400

Project Description

The first request was for \$119,400 to restore 33 magnificent original windows primarily in the Aldermanic chambers and the War Memorial. The windows had deteriorated badly over 70+ years. When this deterioration CPA Annual Report FY03

made action imperative, the City proposed undertaking the most economical solution to the problem – replacement with new wood or vinyl windows. At the urging of the Historical Commission, and with the support of the Board of Aldermen, this approach was abandoned in favor of rehabilitating the original wood windows and retrofitting them with more energy-efficient individually insulated glass panes.

Project Analysis

Since the Community Preservation Act prohibits "maintenance" as a category of expenditure, an argument was made that this project was not eligible for funding. After discussion, the CPC felt strongly that the longevity of these windows, the fact that they had lasted 70 years, obviated the concern about "maintenance." This proposal was not designed to "maintain" but to "preserve" the windows in this historically important building.



City Hall Restoration—Lighting

Requested Funding: \$96,200 Approved Funding: \$96,200

Project Description

This request was the second part of the Public Buildings Task Force proposal. In the early 1970's, in order to conserve electricity and, apparently, to create better lighting, approximately sixteen original hanging light fixtures were removed from City Hall hallways, and were replaced by "modern" fluorescent fixtures. The Task Force strongly believed that the new fixtures harmed the appearance of City Hall and should be replaced by replicas of the originals. Fortunately, a few original fixtures were still in place, i.e. along the first floor corridor leading to the War Memorial. Also, it was determined that the replicas would provide excellent lighting.



Project Analysis

The CPC was most pleased to recommend to the Aldermanic Committees and the full Board that the new light fixtures be purchased with CPA funds, in the amount \$96,200. Public citizens, particularly the League of Women voters, questioned the CPC about this expenditure, arguing that this was unnecessary given the fact that the existing fluorescent lighting was perfectly adequate to light the hallways. The CPC rejected that argument because one of our principal mandates is historic preservation. This project restores the beauty of the original lighting and the original character of City Hall, without sacrificing lighting or using excessive electricity.

City Hall Restoration—Restoring Exterior Ballustrade

Requested Funding: \$175,660 **Approved Funding:** \$175,660

Project Description

The third component of the Public Buildings Task Force request was to restore the existing balustrade that sits atop the entire perimeter of City Hall, one of the most beautiful and visible features of City Hall. The CPA Annual Report FY03

balustrade had been partially restored approximately ten years before, but the work had never been finished. A grayish lead coating had been applied to the balustrade to temporarily protect it from weather and deterioration. The request from the Task Force was to apply the white paint finish that had not been completed, but was originally planned during the last restoration.

Project Analysis

This request again raised the "maintenance" issue for the Community Preservation Committee. In common discourse, "painting" is virtually always considered to be a maintenance item.



Task Force members were persuasive, however, in arguing that maintenance of an historic building is not the same as maintenance of, say, a park bench. Restoration of an historic building could often be construed as maintenance, but a careful reading of the legislation led us to conclude that restoration of the balustrade to its original white condition was not proscribed. The CPC voted to recommend the sum of \$175,660 to the full Board of Aldermen. CPC members did express a concern that the City Public Buildings Department should be responsible for future upkeep, maintenance, and touch-up of the balustrade.

Lessons Learned

The issue of "maintainence vs. preservation" is raised more directly here in the case of the balustrade, primarily because of the length of time that has elapsed for the different tasks: The windows are 70 years. After 70 years, a "maintenance" project is clearly about "restoration." With the lighting, we are restoring the light fixtures to their original design. The painting requested in this proposal was to finish the job of restoring the balustrade. Paint is the final component, and funds were not available a decade ago when the restoration was halted. But the paint will not last another 70 years. When this paint deteriorates, which will happen unevenly due to weather and exposure, the CPC expects that the Building Department will have set aside regular funds to touch up and repaint as necessary.

Newton Corner Library

Location: 124 Vernon Street, Assessor's parcel id#720040004 **Applicant:** Newton Free Library & Public Buildings Department

Requested Funding: \$196,000 **Approved Funding:** \$195,129

Project Description

The Newton Corner Branch Library is housed in a ca 1845 Greek Revival style house that has deteriorated badly. The gutters, downspouts, fascia, brackets, cladding, porches, railings, and other exterior wood trim are in extensive need of restoration. The Public Buildings Department and the Newton Free Library applied for a grant of \$196,000 to preserve the building.

Project Analysis

The Library Director made a convincing presentation at the public hearing and other public meetings. However, a small part of the scope of work included \$871 for corrective work on the recently-completed handi-

capped accessibility project. This issue raised a concern that this was not an appropriate use of the CPA funds. Therefore, the CPC voted to recommend \$195,129 (rather than the full \$196,000) to the Board of Alderman for approval.

The Aldermanic Ad Hoc Committee for Community Preservation meeting raised an important question about placing restrictions of the Newton Corner Library in order to permanently protect the CPA expenditure. Several meetings were held with CPC members, members of the Public Buildings Task Force, the Newton Historical Commission, and the Library Director to address this important issue. A Memorandum of Understanding, executed by the Mayor, Historical Commission, Library Director, and Public Buildings Commissioner, granting design review authority to the Historical Commission for future modifications to the building, has been a temporary solution to this issue. The long-term solution will undoubtedly involve the Board of Alderman and may include an amendment to the existing Landmark Ordinance or a new Public Buildings Preservation Ordinance.

Lessons Learned

The lesson here is one that all granting agencies consider: How to protect the expenditure of funds and ensure that the impact of the funds lasts as long as possible. In this case, various sectors of the City worked together creatively to solve the problem.

NON-FUNDED REQUESTS

Archeological Survey

Applicant: Barbara Donohue, Archeological Consultant

Requested Funding: \$24,780 **Approved Funding:** None

Project Description

The goal of this project was to provide a "predictive model of archaeological potential that will be a planning tool" for site plan review of development projects in Newton. This information was described as necessary "to assist project proponents in avoiding locations where archaeological sites may be encountered."

Project Analysis

A worthy goal, the project was deemed not to be within the purview of the Community Preservation Act. Nevertheless, a planning proposal of this type could conceivably be considered favorably in the future if it was thought to contribute to an overall plan for historic preservation.

50 Fairlee Road

Location: Newton Highlands, Assessor's parcel id#540080039

Applicant: Owners of 50 Fairlee Road

Requested Funding: None

Project Description

The owners at 50 Fairlee Road, an extraordinary home in Newton Highlands that dates from the 17th century, offered the house for sale to the CPC. Not only was the historic portion of the property in need of restoration, but there was potential to create a community housing and an open space component. It was an exciting opportunity and CPC members met with the Newton Historical Commission and the Historical Society, community housing developers, open space advocates, and non-profits to try to formulate a plan.

Project Analysis

CPC efforts to act as project developer, a role which was endorsed by many supporters of the CPC referendum, did not come to fruition. The project was too complicated and the interests of the parties could not be aligned. No funds were requested or granted, and the disposition of the property is being negotiated with private developers and the Newton Historical Commission.

Lessons Learned

The CPC can't be an impartial body making recommendations to the Board if it is also a project proponent/developer. The CPC is most effective as a grant making agency, setting appropriate conditions as needed and allowing existing community organizations or City departments to undertake the work necessary to implement community preservation projects.

Pillar House

Location: 585 Grove Street, Assessor's parcel id#420290034 **Applicant:** Newton Historic Preservation Association, Inc and

Developmental Resources, Inc. **Requested Funding:** \$600,000

Project Description

The Newton Historic Preservation Associates, Inc., a private non-profit organization headed by Dennis Reiske, applied to the CPC for funds to relocate the Pillar House from its location in the Route 128 exit ramp to a subdivided single-family zoned lot of land on Grove St. in Auburndale. The proposal was deemed to be "complete," and the applicant was given an opportunity to present his proposal at a public hearing in December, 2002.

Project Analysis

The proposal had a very attractive goal: to save and restore one of Newton's most visible and grand historic buildings. The major problem with the application was that the applicant did not have site control of the parcel, and hence did not have a contractual agreement with the Massachusetts Highway Department. The application was withdrawn before the CPC had an opportunity to discuss the most interesting aspect of the proposal, that is, the expenditure of public monies to preserve what would become a private residence.

RECREATION

GOALS

- 1. Address the needs targeted in the Recreation and Open Space Plan and take advantage of other opportunities to meet the recreation needs of the residents of the City.
- 2. Meet the recreation needs of the greatest number of residents possible
- 3. Meet the greatest variety of recreation needs possible.
- 4. Serve passive as well as active uses. Finding ways to balance the range of recreational opportunities and serve the diverse recreation needs of the community is a priority of the CPC.
- 5. Preserve sight lines consistent with open space. ... Decisions about scale and placement should be made with the objective of enhancing or enabling open views.
- 6. Access for disabled residents should be included in plans wherever possible.

Four recreation projects were recommended and approved for CPA funding in FY2003. Three of the projects involved creating new recreation facilities: Forte Park, Albemarle Community Classroom, and Kayla's Garden. The fourth recreation project will preserve an existing play field, Thompsonville Playground, at Bowen Elementary School, by installing an irrigation system.

The four projects approved address many of the recreation goals set out by the CPC, particularly addressing recreation needs in the City, serving passive and active uses, and providing access for disabled residents. Two of the four projects address priorities set out in the Recreation and Open Space Plan for the City and we hope to have the opportunity to achieve more of the goals outlined in the Plan in the coming year.

FY03 PROJECTS

Forte Park, Phase II

Location: California Street, Assessor's parcel id#110040013

Applicant: Parks & Recreation Department

Requested Funding: \$500,000

Approved Funding: \$500,000 (with an expected \$250,000

reimbursement)

Project Description

Phase I or Forte Park reconstruction was completed in the late 1990s and entailed renovation of the playing fields, rebuilding of the basketball court, creation of a parking lot, and



installation of new play equipment and other amenities. Phase II called for installation of lighting, construction of a bocce court, and creation of jogging/exercise paths. Half of the Phase I had been funded throught a federally-funded program and an application had been prepared for submission to the same fund for the second phase. The Federal program operates as a matching fund, requiring the local government to line up full funding, then to be reimbursed 50 cents on the dollar at project completion. The request to the CPC was to approve funding of

the full \$500,000 phase II cost, with the understanding that \$250,000 would be returned to the CP Fund at the time of Federal reimbursement.

Project Analysis

The hitch in this application (which was received on November 1, 2002) was that applications were due to the State in late December 2002, requiring that CPC and the full Board of Aldermen complete their deliberations in time for this deadline to be met in order to qualify for the 50% Federal match. With this in mind, the CPC approved the project in a special meeting following the December public hearing and referred the recommendation to the Board of Aldermen, where it was fast-tracked as well. As the first CPC-approved project to go before the Board, this proposal raised many of the process and substantive issues that we have encountered during the CPC's initial year. First, no one likes to be rushed and there was agreement on all parts that we would try to keep these situations to a minimum. Second, since this project had been included on the City's Capital Improvement Program (CIP) list for several years, the intersection of CPA and CIP was therefore raised. Some thought that CPA funds should never be used for CIP projects. Others felt that CIP projects that fit CPA funding criteria were appropriate if the community benefits of the project and the inability of the city to otherwise support it were demonstrated. In the end, this project was approved both by CPC and the Board of Aldermen and the City has qualified for the Federal match.

Lessons Learned

It is important to respond in a timely way to projects that have specific deadlines for other funding sources. This project, in particular, was seeking to match the CPA funds through a 50% reimbursable program.

Irrigation Of Thompsonville Playground (Bowen Elementary School)

Location: 280 Cypress Street, Assessor's parcel

id#650190046

Applicant: Newton East Little League and Newton Youth

Soccer League

Requested Funding: \$138,015 Approved Funding: \$56,805

Project Description

This project was brought to CPC by the Newton East Little League in conjunction with the Youth Soccer League. It initially encompassed four sites: the Thompsonville Playround



at Bowen Elementary School, the ballfield at Countryside School, and two fields at Memorial Spaulding. Irrigation of athletic fields has been a priority for about ten years. Irrigation is necessary to build durable turf and the intensity with which Newton's athletic facilities are used requires durability. Irrigation also minimizes the use of pesticides and enables the City to maximize the value of turf renovations and upgrades.

Project Analysis

Since this project was brought to the CPC by community groups, not by the City, we wondered how these facilities ranked on the City's list of priorities. Of the four, Bowen was high on the list, the others were further down. A new drainage system and other repairs to the field were scheduled to be completed by the builder of an

adjacent development, so the opportunity to irrigate the site at the same time was fortuitous. CPC was also concerned that previous irrigation projects were funded as public-private partnerships, with local youth sports organizations contributing about half of the cost. Newton East Little League had proposed a five-year maintenance agreement and ultimately extended that to seven years in order to reach the halfway mark in terms of equivalent value. The CPC recommended and the Aldermen approved \$56,805 for this project, which is expected to be completed next spring.

Lessons Learned

The principal lesson learned from this project was the need to coordinate between City priorities and community interests. While we want to encourage creativity and initiative among community groups, we also want to use CPA funds wisely, taking into account the planning and thought that has been invested by those City officials who are charged with this responsibility. This dichotomy is one we will undoubtedly encounter in future projects. Our intent is to deal with these situations on a case-by-case basis, assessing community value, consulting with city officials and doing our best to determine the highest and best use of CP funds. In addition, the CPA application will now require the City body with jurisdication over the land to be an applicant in conjunction with the community group.

Albemarle Community Classroom

Location: 250 Albemarle Road, Assessor's parcel id#210220001

Applicant: The Playground Project at Albemarle, Inc.

Requested Funding: \$99,931 Approved Funding: \$99,931

Project Description

This project was also initiated by a community group. It involves creation of a facility in an area of the Halloran Sports and Recreation Complex (formerly know as Albemarle Playground) that previously contained a tot lot. The space was vacated when a new tot lot was constructed in an adjacent area. The proposed facility includes gardens, a gazebo, benches, and other amenities. It would be used by the Horace-Mann school, other schools and community groups for passive recreation. In addition, the gazebo provides much needed shading in recreation area without much sun protection.

Project Analysis

The key issue arising from this application pertains to control of the site in question. While the Parks and Recreation Department, which has jurisdiction over this site, was aware of the proposal, they had not formally endorsed it. Nor had the Parks and Recreation Commission approved the use, which they are required to do by City Ordinance. The CPC deferred its consideration of this project, pending that approval. The lesson learned from this experience is that site control approvals for projects to be built on City property must be obtained prior to CPC review. This requirement will be incorporated in the instructions for applicants for the next funding round. Other issues involved the preparation of engineering plans for the proposed structure, firming up of the budget, including the development of a budget contingency, and the procurement of other approvals, particularly by the Conservation Commission given the proximity of the project to Cheesecake Brook. Satisfied that these steps were accounted for and recognizing strong community support for the project, the CPC recommended and the Board of Aldermen approved \$99,931 toward the cost of this effort. The project is expected to be complete in the spring or summer of 2004.

Lessons Learned

- 1. Community groups should be encouraged to follow through with ideas to improved City property. However, it is critical that the City Department, Board, or Commission which has control over that City property should also be an applicant for the funding and it should be clear that this project fits in with other uses or plans for the site, particularly a multi-use recreation complex.
- 2. All City reviews and approvals required for the project should be completed prior to a CPA funding decision. For example, this project required the Parks and Recreation Commission to approve the proposed use of the land and this review triggered reviews by various other bodies including Engineering, Planning, and the Conservation Agent.

Kayla's Garden

Location: 250 Brookline Street, Assessor's parcel

id#820210001

Applicant: Memorial-Spaulding Elementary School &

PTO

Requested Funding: \$100,718 Approved Funding: \$23,718

Project Description

This outdoor classroom was proposed in memory of Kayla Rosenberg, one of the students who died in the Nova Scotia bus accident. Located in a small space near Memorial-Spaulding Elementary School, the proposal envisioned a centerpiece statue



costing approximately \$75,000, as well as gardens, benches, and other amenities. A well developed curriculum and plan for use of the area was submitted along with the proposal. The project would take advantage of an area created by the recent renovation of the school.

Project Analysis

Three issues arose from this application. First was the question of whether CPA funds could be used to purchase public art. The Committee ultimately determined that this was not an expense we could recommend. Secondly, the site control issue outlined under Albemarle Community Classroom was raised. This was resolved by subsequent approval of the project by the School Committee, which has jurisdiction. Finally, the process for naming a site on public property was raised by the Board of Aldermen. This matter was also referred to the School Committee for their review and action. The CPC recommended and the Aldermen approved \$23,718 for this project and completion is anticipated in the summer of 2004.

Lessons Learned

- 1. Similar to one of the lessons learned through the Albemarle Project, it is critical that the City Department, Board, or Commission which has control over that City property should also be an applicant for the funding. In this case, the School Committee has control over the land. In the end the funding is in the control of the School Committee, rather than the PTO.
- 2. The CPC made an important policy decision through its deliberation on this project: The CPA should not fund public art, even as a component of a larger recreation project. The CPC did not recommend funding for the statue that was proposed as part of this project.

NON-FUNDED REQUESTS

Crystal Lake Docks

Location: Lake Avenue in Newton Center, Assessor's parcel id#990990202

Applicant: Parks & Recreation Department

Requested Funding: \$92,000

Project Description

The Parks & Recreation Department requested \$92,000 to replace existing 17 year-old wooden docks with a new dock system since the present docks are in disrepair. The docks are needed to delineate swim areas, allow lifeguards accessibility to a larger area, and allow swim instructors to carry out instruction from the docks. The proposed dock system is constructed of marine-grade aluminum structural channel, tubing and flat bar and the decking is TREX Easy-Care brand decking, a recycled plastic product.

Project Analysis

The CPC struggled with the issue of whether or not this project met the funding criteria, particularly whether or not the project was maintenance, rehabilitation, preservation, or creation. The CPC also struggled with the issue of whether or not this project was more appropriately funded under the CIP rather than CPA. In the end, a clear determination was not made, since the application was withdrawn and CIP funding was designated for the project.

Other Projects

Several other projects contained recreation benefits secondary to other purposes under CPA. These include Flowed Meadow, Elgin Street, Burying Grounds, Kesseler Woods, and Webster Place. They are discussed in detail elsewhere in this report.

COMMUNITY PRESERVATION COMMITTEE MEMBERS

Jeffrey Sacks, Chair Housing Authority

Douglas Dickson, Vice Chair Mayoral Appointee for Recreation

Charles McMillan
Historical Commission

Joyce Moss
Planning & Development Board

Hallie Pinta
Mayoral Appointee for Community Housing

Eric Reenstierna
Conservation Commission

Andrew Stern
Parks & Recreation Commission

Setti Warren Mayoral Appointee for Open Space

Claudia Sauermann Wu Mayoral Appointee for Historic Preservation

> Glenn Vanaman (past member) Planning & Development Board



Community Preservation Committee Members: (Left - Right) Douglas Dickson, Joyce Moss, Charles McMillan, Jeffrey Sacks, Eric Reensteirna, Claudia Sauerman Wu, and Andrew Stern (Members Setti Warren and Hallie Pinta, and past member Glenn Vananman are were not present for the photograph).